

990-PF

Form
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation MARION E KENWORTHY SARAH H SWIFT FOUNDATION C/O KATHRYN CONROY % KATHRYN CONROY		A Employer identification number 13-6140940	
Number and street (or P.O. box number if mail is not delivered to street address) 227 Ocean Parkway 5B		Room/suite	B Telephone number (see instructions) (347) 882-2774
City or town, state or province, country, and ZIP or foreign postal code BROOKLYN, NY 11218		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 10,752,809		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	7,150			
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	455,461	455,461	455,461	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	468,928			
	b Gross sales price for all assets on line 6a 1,255,315				
	7 Capital gain net income (from Part IV, line 2)		468,928		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	931,539	924,389	455,461	
	13 Compensation of officers, directors, trustees, etc.	40,000	10,000	10,000	30,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	7,200	7,200	7,200	0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	12,903	12,903	12,903	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	99,361	99,361	99,361	
	24 Total operating and administrative expenses. Add lines 13 through 23	159,464	129,464	129,464	30,000
	25 Contributions, gifts, grants paid	635,000			635,000
	26 Total expenses and disbursements. Add lines 24 and 25	794,464	129,464	129,464	665,000
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	137,075			
	b Net investment income (if negative, enter -0-)		794,925		
	c Adjusted net income (if negative, enter -0-)			325,997	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		356,365	536,119	536,119
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)	7,480,927	7,435,914	10,216,690	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	7,837,292	7,972,033	10,752,809		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).	0	0		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds	7,837,292	7,972,033		
	29	Total net assets or fund balances (see instructions)	7,837,292	7,972,033		
30	Total liabilities and net assets/fund balances (see instructions) .	7,837,292	7,972,033			

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	7,837,292
2	Enter amount from Part I, line 27a	2	137,075
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	7,974,367
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,334
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	7,972,033

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a 4000 SH BLACKROCK HEALTH		2020-01-29	2023-02-07
b 1000 SH BLACKROCK SCIENCE		2021-05-06	2023-02-07
c 346 SH PFIZER INC		2021-05-10	2023-02-07
d 50 SH ALPHABET INC		2018-02-16	2023-04-13
e 900 SH ALTRIA GROUP		2010-04-13	2023-04-20
1000 SH BLACKROCK HEALTH		2020-01-29	2023-04-13
2320.832 SH BLACKSTONE ALTERNATIVE		2019-03-01	2023-04-13
1000 SH DNP SELECT		2014-04-11	2023-04-13
100 SH WALT DISNEY CO		2019-04-10	2023-04-13
500 SH ALTRIA GROUP		2014-10-07	2023-05-10
100 SH APPLE INC		2018-02-15	2023-05-10
1000 SH BLACKROCK HEALTH		2020-06-03	2023-05-10
1000 SH BLACKROCK SCIENCE		2019-10-25	2023-05-10
100 SH BLACKSTONE INC		2019-04-25	2023-05-10
100 SH HONEYWELL INTL		2010-06-03	2023-05-10
40 SH MICROSOFT CORP		2018-02-16	2023-05-10
1000 SH ALTRIA GROUP		2010-04-14	2023-06-09
850 SH APPLE INC		2016-06-08	2023-06-20
3000 SH BLACKROCK HEALTH		2020-01-29	2023-06-09
1700 SH BLACKROCK SCIENCE		2019-10-25	2023-06-09
100 SH HONEYWELL INTL		2010-06-03	2023-06-09
100 SH MERCK & CO		2013-02-07	2023-06-09
110 SH MICROSOFT CORP		2015-02-10	2023-06-20
50 SH APPLE INC		2016-01-08	2023-07-18
200 SH BLACKSTONE INC		2017-02-17	2023-07-18
400 SH APPLE INC		2016-01-08	2023-08-04
100 SH ALPHABET INC		2018-02-16	2023-09-18
300 SH ALTRIA GROUP		2014-10-07	2023-09-18
200 SH APPLE INC		2016-01-08	2023-09-18
300 SH BLACKSTONE INC		2017-02-17	2023-09-18
300 SH CISCO SYSTEMS INC		2016-01-08	2023-09-18
100 SH MERCK & CO		2013-02-07	2023-09-18
80 SH MICROSOFT CORP		2015-02-10	2023-09-18
100 SH WALT DISNEY CO		2019-04-10	2023-09-18
700 SH ALTRIA GROUP		2014-10-07	2023-10-09
300 SH BLACKSTONE INC		2017-02-17	2023-10-09
5,000 SH PIMCO ENERGY		2019-10-25	2023-10-24
4M CITIGROUP INC		2019-02-12	2023-11-15
3500 SH PIMCO DYNAMIC		2021-03-01	2023-11-13

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 65,420		82,108	-16,688
b 18,620		36,741	-18,121
c 15,003		13,665	1,338
d 5,365		2,758	2,607
e 40,745		19,171	21,574
16,635		19,892	-3,257
23,766		25,000	-1,234
10,711		8,869	1,842
9,989		11,700	-1,711
22,877		23,210	-333
17,296		4,349	12,947
16,334		20,180	-3,846
16,314		22,713	-6,399
8,217		3,566	4,651
19,624		4,156	15,468
12,460		3,717	8,743
45,485		27,815	17,670
155,615		20,613	135,002
48,690		59,677	-10,987
30,285		30,898	-613
19,733		4,156	15,577
11,142		3,914	7,228
37,562		4,695	32,867
9,629		1,213	8,416
21,199		5,046	16,153
72,637		13,547	59,090
13,916		5,516	8,400
13,033		13,925	-892
36,669		4,850	31,819
32,656		7,569	25,087
17,081		7,422	9,659
10,784		3,914	6,870
26,258		3,415	22,843
8,558		11,700	-3,142
29,690		32,488	-2,798
31,214		7,384	23,830
95,531		63,298	32,233
100,000		106,862	-6,862
68,572		44,675	23,897

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-16,688
b			-18,121
c			1,338
d			2,607
e			21,574
			-3,257
			-1,234
			1,842
			-1,711
			-333
			12,947
			-3,846
			-6,399
			4,651
			15,468
			8,743
			17,670
			135,002
			-10,987
			-613
			15,577
			7,228
			32,867
			8,416
			16,153
			59,090
			8,400
			-892
			31,819
			25,087
			9,659
			6,870
			22,843
			-3,142
			-2,798
			23,830
			32,233
			-6,862
			23,897

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	468,928
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	

Part V

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		1	11,049
	All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) under Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	
3	Add lines 1 and 2.		3	11,049
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	11,049
6	Credits/Payments:			
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a		
b	Exempt foreign organizations—tax withheld at source	6b	0	
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7	0	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	423	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	11,472	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	10		
11	Enter the amount of line 10 to be: Credited to 2024 estimated tax	Refunded	11	

Part VI-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.			No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ (2) On foundation managers. ▶ \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," attach schedule. See instructions.</i>	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ http://kenworthyswiftfoundation.org/	13	Yes	
14	The books are in care of ▶ KATHRYN CONROY Telephone no. ▶ (347) 882-2774 Located at ▶ 21 KERMIT PLACE BROOKLYN NY ZIP+4 ▶ 11218			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2023, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. <i>If "Yes", enter the name of the foreign country</i> ▶	16	Yes	No

Part VI-B **Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly):		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	1a(5)		No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
c	Organizations relying on a current notice regarding disaster assistance check here.  			
d	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2023?	1d		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023? If "Yes," list the years  20____, 20____, 20____, 20____	2a		No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2023 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2023.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2023?	4b		No

Part VI-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

(3) Provide a grant to an individual for travel, study, or other similar purposes?

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

b

If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

c

Organizations relying on a current notice regarding disaster assistance check

d

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

8

Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

Yes

No

5a(1)

No

5a(2)

No

5a(3)

No

5a(4)

No

5a(5)

No

5b

5d

6a

No

6b

No

7a

No

7b

8

No

Part VII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
HARVEY KURZWEIL Winston Strawn LLP 200 Park Ave new york, NY 10166	TREASURER 0	0	0	0
JENNIFER HAVENS 555 10th Avenue 31A NEW YORK, NY 10018	PRESIDENT 0	0	0	0
GAIL NAYOWITH 20 East 35th Street 12-C new york, NY 10016	VICE PRESIDENT 0	0	0	0
Kathryn Conroy 227 Ocean Parkway 5B brooklyn, NY 11218	Executive Director 0	40,000	0	0
Julia Jean-Francois MSW PhD 443 39th Street BROOKLYN, NY 11232	DIRECTOR 0	0	0	0
Nancy Ginsburg JD 526 East 89th Street NEW YORK, NY 10128	SECRETARY 0	0	0	0
Michael A Lindsey PhD MSW MPH 1 Washington Square North NEW YORK, NY 10003	DIRECTOR 0	0	0	0
Hon Barbara Salinitro 240-30 Maryland Road DOUGLASTON, NY 11362	DIRECTOR 0	0	0	0
Warren Y K Ng MD MPH 622 West 168th Street PB 02-213 NEW YORK, NY 10032	DIRECTOR 0	0	0	0
Aaron Reliford MD One Park Ave SoUTH 7th fl NEW YORK, NY 10016	DIRECTOR 0	0	0	0

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

Total

number of other employees paid over \$50,000.

Part VII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 **Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

Total number of others receiving over \$50,000 for professional services. 

Part VIII- Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part VIII- Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	9,711,466
b	Average of monthly cash balances.	1b	269,680
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,981,146
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	9,981,146
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	149,717
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	9,831,429
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	491,571

Part X Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part IX, line 6.	1	491,571
2a	Tax on investment income for 2022 from Part V, line 5.	2a	11,049
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	11,049
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	480,522
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	480,522
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. . . .	7	480,522

Part XI Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	665,000
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	665,000

Part XII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7				480,522
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2022 only.			0	
b Total for prior years: 2021, 2020, 2019		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2018.				
b From 2019.				
c From 2020.				
d From 2021.			0	
e From 2022.			44,423	
f Total of lines 3a through e.	44,423			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ 665,000				
a Applied to 2022, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2023 distributable amount				480,522
e Remaining amount distributed out of corpus	184,478			
5 Excess distributions carryover applied to 2023. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	228,901			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2018 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a	228,901			
10 Analysis of line 9:				
a Excess from 2019				
b Excess from 2020				
c Excess from 2021.			0	
d Excess from 2022			44,423	
e Excess from 2023			184,478	

a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, enter the date of the ruling

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

Part	Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)
1	Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.) 1. Name of the foundation: 2. EIN: 3. State: 4. City: 5. ZIP: 6. Telephone: 7. Website: 8. Date of formation: 9. Date of termination: 10. Date of dissolution: 11. Date of liquidation: 12. Date of conversion: 13. Date of merger: 14. Date of acquisition: 15. Date of disposition: 16. Date of other event: 17. Date of other event: 18. Date of other event: 19. Date of other event: 20. Date of other event:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
EXALT YOUTH 17 Battery Place 3rd Floor 307 NEW YORK,NY 10004	NONE	P C	ongoing support of their core program allowing them to serve 975 court-involved youth in NYC.	20,000
CASES 2090 Adam Clayton POWELL BLVD NEW YORK,NY 10027	NONE	P C	support the OnTrackNY program providing mobile coordinated specialty care (CSC) services to youth and young adults who have experienced first episode psychosis (FEP).	25,000
Covenant House NY 460 W 41st St NEW YORK,NY 10036	NONE	P C	to provide evidenced-based, trauma-informed work with young people, age 14 to 26, who are experiencing homelessness in NYC, as well as to their dependent children.	35,000
ASSOCIATION TO BENEFIT CHILDREN 34-05 80th St Apt 41 QUEENS,NY 11372	NONE	P C	to sustain and expand ABC's Fast Break Children's Mobile Mental Health Services.	35,000
The DOOR 555 BROOME ST NEW YORK,NY 10013	NONE	P C	to support their capacity to reach thousands of NYC youth with clinical and community-based services across their comprehensive mental health continuum.	35,000
New York Society Prevention of Cruelty to Children 520 8th Ave Suite 1401 NEW YORK,NY 10018	NONE	P C	to support the provision of therapeutic services to help children recover from physical abuse, sexual abuse,parental/caretaker neglect and domestic violence.	25,000
THE POSSIBILITY PROJECT 104 W 27th St NEW YORK,NY 10001	NONE	P C	to bring together 30 NYC youth, 15 involved in the justice system and 15 youth in foster care, to work together in theater to change negative experiences into positive action.	25,000
Sakhi for South Asian Women PO Box 1333 NEW YORK,NY 10008	NONE	P C	to support mental health services for South Asian children and youth affected by gender-based violence.	25,000
GOOD SHEPARD SERVICES 2 Astor Pl NEW YORK,NY 10003	NONE	P C	to continue our support for their newly created position of Vice President for Clinical and Mental Health Services.	25,000
red hook initiative 767 Hicks St BROOKLYN,NY 11231	NONE	P C	to support their Health & Wellness Program for ages 11 thru 24 from low-income BIPOC families in Red Hook, Brooklyn.	20,000
UNITED NEIGHBORHOOD HOUSES OF NY 45 Broadway NEW YORK,NY 10006	NONE	P C	to provide mental health training and coaching to early childhood teachers and leaders across UNH member settlement houses.	25,000
COMUNLIFE 462 7th Avenue NEW YORK,NY 10018	NONE	P C	to support their "Life is Precious Program" which provides creative art therapy activities to Latina teens at risk of suicide.	20,000
Ackerman Institute 936 Broadway 2nd Fl NEW YORK,NY 10010	NONE	P C	to support a project to improve access to mental healthcare for low-income New York City youth ages 12 to 18.	20,000
American Central Asian Association 271 Brighton Beach Ave 2nd floor	NONE	P C	to support clinical and mental health services in their social work department for children and youth in NYC who come	20,000

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities				14	455,461	
5 Net rental income or (loss) from real estate:						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory				18	468,928	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue: a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e) . .					924,389	
13 Total. Add line 12, columns (b), (d), and (e).				13		924,389

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVI Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3) Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees. . . .

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fa

of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair

In any transaction or sharing arrangement, show in column (4) the value of the goods, other assets, or services received.

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee	Date	Title
	2024-05-15	

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☒ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01350299
	Firm's name ▶ DORFMAN MIZRACH & THALER LLP				Firm's EIN ▶
	Firm's address ▶ 555 ROUTE ONE SOUTH ISELIN, NJ 08830				Phone no. (732) 404-1860

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 IRS 990 e-File Render

Name: MARION E KENWORTHY SARAH H SWIFT FOUNDATION

C/O KATHRYN CONROY

EIN: 13-6140940

Category	Amount
NONE	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2023 IRS 990 e-File Render

Name: MARION E KENWORTHY SARAH H SWIFT FOUNDATION

C/O KATHRYN CONROY

EIN: 13-6140940

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
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TY 2023 IRS 990 e-File Render

Name: MARION E KENWORTHY SARAH H SWIFT FOUNDATION
C/O KATHRYN CONROY

EIN: 13-6140940

Description	Amount
ADJUSTMENT TO BASIS FOR SECURITIES	2,334

TY 2023 IRS 990 e-File Render

Name: MARION E KENWORTHY SARAH H SWIFT FOUNDATION
C/O KATHRYN CONROY

EIN: 13-6140940

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	4,547	4,547	4,547	
FILING FEES	250	250	250	
INVESTMENT FEES	94,564	94,564	94,564	

TY 2023 IRS 990 e-File Render

Name: MARION E KENWORTHY SARAH H SWIFT FOUNDATION
C/O KATHRYN CONROY

EIN: 13-6140940

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	7,588	7,588	7,588	
FOREIGN TAX	5,315	5,315	5,315	